

Zoho Integration

Yeastar S-Series VoIP PBX

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Zoho Integration Guide

About this guide

This guide introduces how to integrate Yeastar S-Series VoIP PBX with Zoho Applications and gives brief instructions of how to use the Zoho integrations features.

Audience

This guide is for administrators who need to integrate Yeastar S-Series VoIP PBX with Zoho CRM, Zoho Desk, Zoho Mail, and Zoho Recruit.

Requirements

- **Zoho editions:** Starter, Standard, Professional, and Enterprise.
- **PBX:** S50, S100, and S300 with firmware version 30.12.0.7 or later.

Zoho Integration Introduction

Zoho Integration App is designed to facilitate quick integration between your Yeastar S-Series VoIP PBX and multiple Zoho applications.

Supported Zoho applications and features

The Zoho Integration App is applicable to the following Zoho applications:

- **Zoho One:** An all-in-one suite of Zoho applications designed to meet user's every business need.
- **Zoho CRM:** Online CRM customer relationship management system and sales management software.
- **Zoho Mail:** Enterprise cloud mailbox designed for corporate users especially.
- **Zoho Recruit:** Online intelligent recruitment management software for corporate human resources.
- **Zoho Desk:** Cloud-based online customer service management system.

The Zoho Integration App enables the following features and benefits in the above Zoho applications:

- **One-for-all Integration:** Integrate multiple Zoho applications at one time in one simple integration process.
- **Click-to-call:** Click on any phone number to make an outbound call right straight from Zoho.
- **Call Pop-ups:** Automatically display the caller information as a screen pop-up upon an inbound call.
- **Call Journals:** All call details will be automatically logged in Zoho to help you keep track of every conversation.

	Zoho One	Zoho CRM	Zoho Mail	Zoho Recruit	Zoho Desk
One for all Integration	√	√	√	√	√
Click to Call	√	√	√	√	√
Call Pop-ups	√	√	√	√	√
Call Journals	√	√	-	-	-

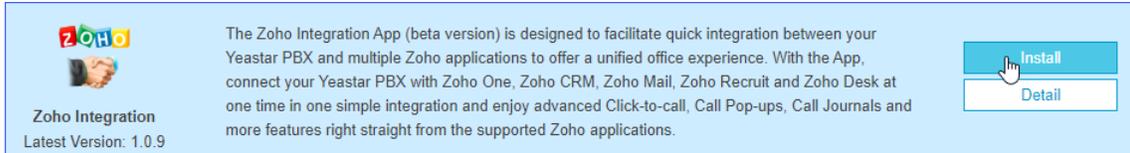
Terminologies

- **Zoho super administrator:** The master that can access all the data and manage all the users in Zoho applications, such as CEO, senior executive, senior administrator, etc.
- **Zoho User:** The corporate staff who can only access specific data based on assigned permissions (roles), such as sales manager, FAE, etc.
- **PBX Extension:** The extension number to each staff. The staffs can register the extension on a phone and use the extension to make calls.

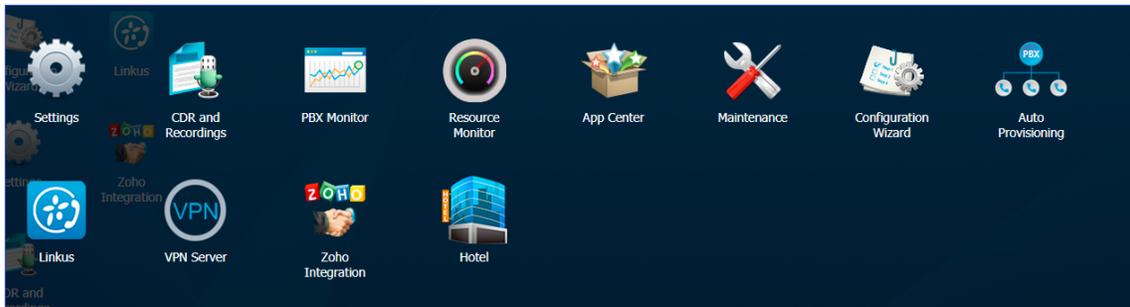
- **Zoho Account:** The companies or departments within a company with which you have business dealings. Single or multiple contacts can be associated to an account.
- **Zoho Contact:** The people in an organization with whom your company has business communications in pursuit of business opportunities.

Install Zoho Integration App

1. Log in PBX web interface, go to **App Center**.
2. Find the **Zoho Integration**, click **install**.



Refresh the page after the installation is complete, click the main menu, the Zoho Integration icon appears.



Zoho Integration

Preparations

Before integrating Zoho applications and Yeastar S-Series VoIP PBX, you need to forward the web access port of the PBX according to your network environment and install HTTPS certificates to secure your network.

Port forwarding

Zoho communicates with Yeastar S-Series VoIP PBX via the following designated ports. You must forward the web access port of your PBX to one of the following external ports.

Supported external ports

- HTTPS 8040
- HTTP 8040
- HTTP 80
- HTTPS 443

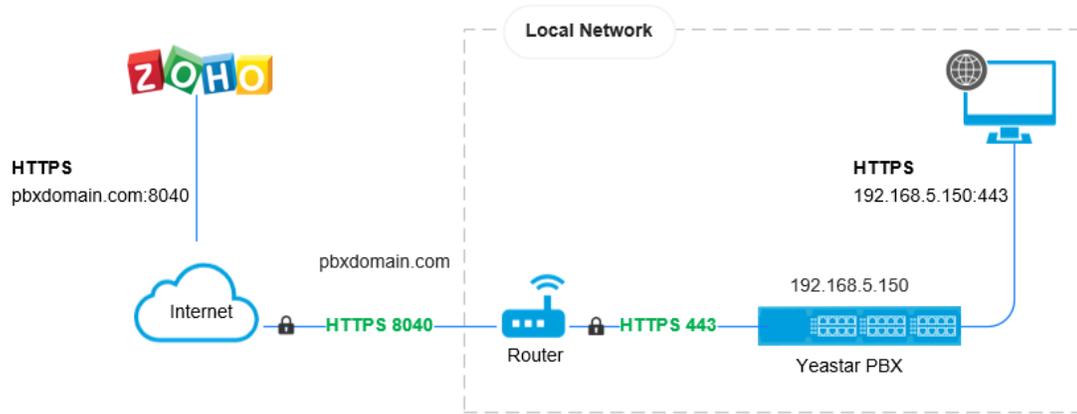


Note: We recommend that you use HTTPS 8040 for secure communication, and upload HTTPS certificate to the PBX.

Port forwarding example

The following figure gives a port forwarding example: Forward the internal port HTTPS 443 to external port HTTPS 8040.

In this way, Zoho communicates with Yeastar S-Series VoIP PBX via HTTPS 8040.



HTTPS Certificate configuration

If your PBX uses HTTPS protocol, you need to upload the HTTPS certificates and keys to your PBX.

Note: The HTTPS certificates and keys should be bought from an official organization, or the certifications would not be authenticated by Zoho.

1. Confirm the PBX domain, and purchase the HTTPS certificate.
2. Make a certificate in pem format.
 - a. Create a new text file with a .pem extension. for example, https.pem.
 - b. Copy and paste the certificate contents and key contents to the https.pem file.

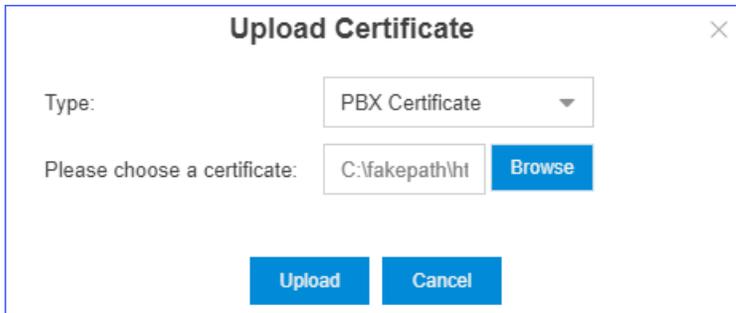
```

https.pem
1  -----BEGIN CERTIFICATE-----
2  MIIFdjCCBF6gAwIBAgISBKPuudrWBJs+2YJFMr+WnfbMA0GCSqGSIb3DQEBCwUA
3  MEoxCzAJBgNVBAYTA1VTMRyWFAYDVQQKEw1MZXQncyBFbmlNyeXBOMSMwIQYDVQ
4  QDEwM2kxM2kxM2kxM2kxM2kxM2kxM2kxM2kxM2kxM2kxM2kxM2kxM2kxM2kx
5  OTEyMjkwNDM1MzZaMB4xHDAaBgNVBAMTE2NuLn11YXN0YXJkbG91ZC5jb20w
6  4m7JiXAcenIM4b7F9LmrfhhFwsZT37Ft14wa5/JZBq/TMgygZLevv18SX/TIGdKh
7  toMLKmFW17/EtTSNtN5FKyb2HXkd6RKiZKuYp1U08UPVv1/UKoYwi10xinJ0hkCHE
8  Kcf4Acojd89QHg==
9  -----END CERTIFICATE-----
10 -----BEGIN CERTIFICATE-----
11 MIIEkjCCA3qgAwIBAgIQCGFBQgAAAVOfc2oLheynCDANBgkqhkiG9w0BAQsFADA/
12 MSQwIqYDVQQKExtEaWdpdGFsIFNpZ25hdHVyZS8uZm9udC5kb20wM2kxM2kxM2kx
13 DkRtVCSBb290IENBIFgzMB4XDTE2MDMxNzE2NDAAO1oXDTLkMDMxNzE2NDAAO1ow
14 SjELMAkGA1UEBhMCVVmMxM2kxM2kxM2kxM2kxM2kxM2kxM2kxM2kxM2kxM2kxM2kx
15 X4PolQYz+3dszkDgMp4fklxkXRsW10KXzPMTZ+sOPaveyxindmjkw31Gy+QsR1G
16 PFZ+G6Z6h7mjem0Y+iWlkYcV4PIWlliwBi8saCbGS5jN2p8M+X+Q7UNKEkRob3N6
17 KQkqm57TH2H3eDJAkSnh6/DNFu0Qg==
18 -----END CERTIFICATE-----
19
20 -----BEGIN RSA PRIVATE KEY-----
21 MIIEowIBAAKCAQEAusueq3+3qHvpOeBC1D1aNXtMlX5xgjW0qtww96hrHjYoVHEK
22 3+qCQ9898S0c7WlwbulaqSnbWgmOwFFbVq1Y2GSVzrMjQKb5YDXOKgxuJ/RfN7NxiY
23 MFKAKd6UwV0vka3ks2zc4AC0EUtepwex9EdQxj526+mlf2yX01x7qBx8GZwt//5
24 okGDLQKbqBRevKc8jymKud40xyWBBRRrpbAK4J4cBqzGYPoPtnNgRppCh/C4nkt1u
25 +TSuDrDV0J9npFF5qk7WeyYXiZhtHmlJQFN0rovH6YXgn76tCXtb84FrH1ZfsEyW
26 fgwDpC+2ugUD2cdf9SuQ11WCnpSoXKvcuQ/7HeLyattUI/vms4/t
27 -----END RSA PRIVATE KEY-----
    
```

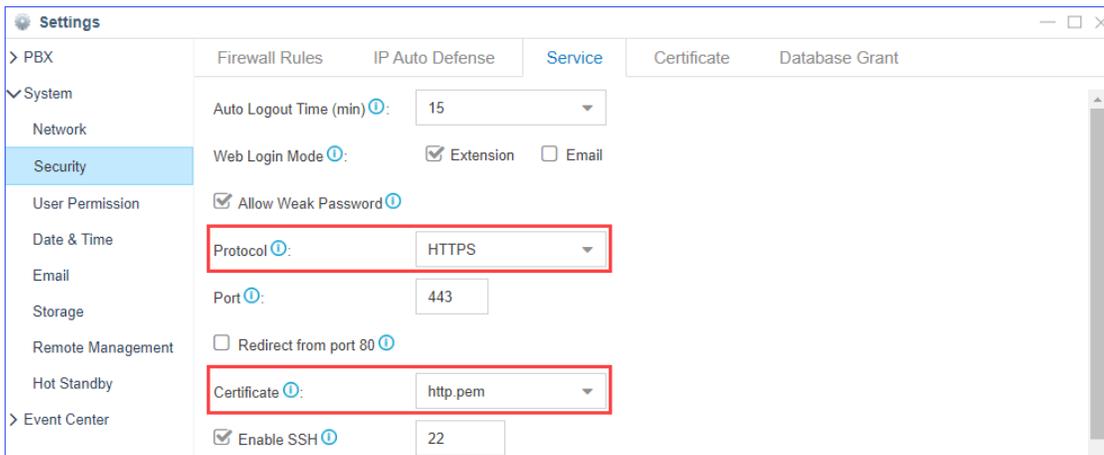
Certificate
(Domain & Intermediate)

Private Key

3. Install the HTTPS certificate on your PBX.
 - a. Log in the PBX web interface, go to **Settings**→ **System**→ **Security**→ **Certificate**.
 - b. Click **Upload**.
 - c. In the **Type** drop-down list, select **PBX Certificate**.
 - d. Click **Browser** to select the pem certificate you made, and click **Upload**.



- e. Go to **Settings**→ **System**→ **Security**→ **Service**.
- f. In the **Protocol** drop-down list, select **HTTPS**.
- g. In the **Certificate** drop-down list, select the uploaded certificate.



- h. Click **Save**.

Integrate Yeastar S-Series VoIP PBX and Zoho Applications

This topic introduces how to integrate Yeastar S-Series VoIP PBX and Zoho applications.

Log in the PBX web interface, open **Zoho Integration**, follow the steps below to complete integration.

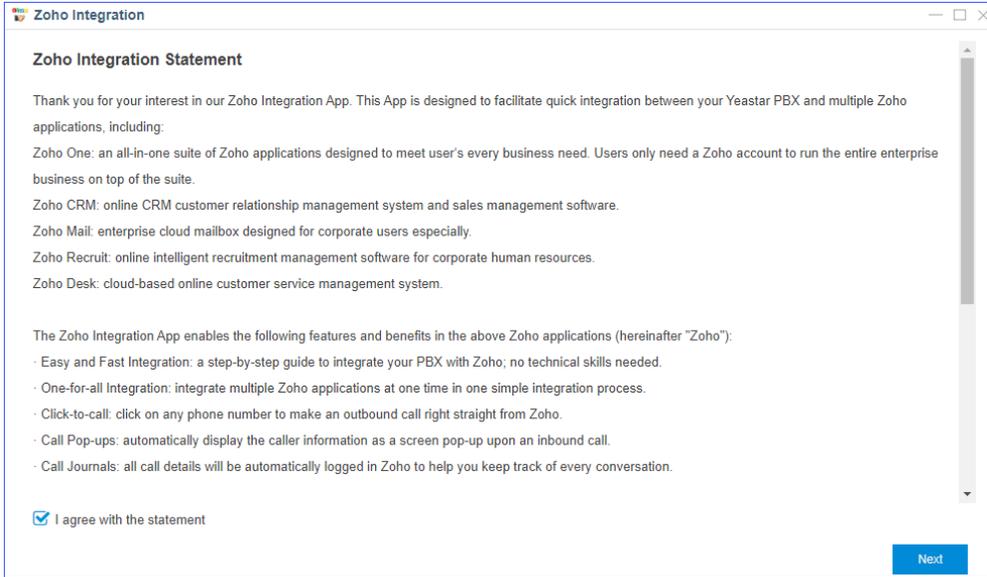


Note:

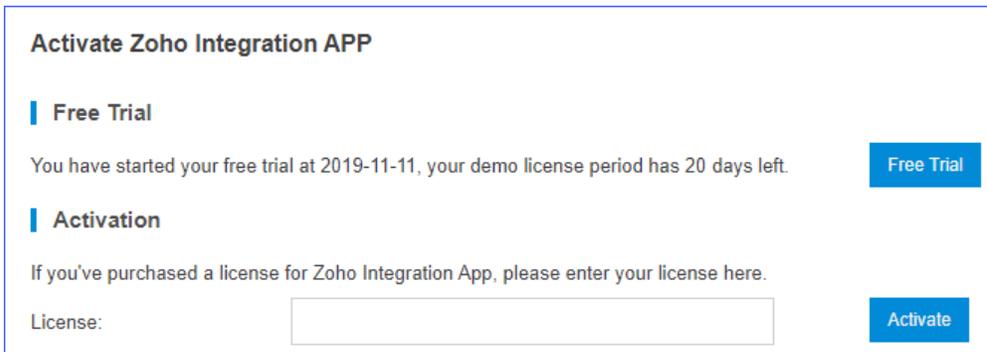
- Only an super administrator can enable the integration.
- Once integration enabled by the super administrator, the integration is activated for all users.

Prerequisite steps

1. Agree with integration statement.
 - a. Read the integration statement, and select the check-box of **I agree with the statement**.
 - b. Click **Next**.



2. Choose to try the Zoho Integration App for free or activate the App.
 - **Free Trial:** Click **Free Trial** to try the App for 30 days.
 - **Activate:** Contact Yeastar to get a license, enter your license here, and click **Activate**.



Step 1. Enter the public IP address or domain

1. In the **Public IP Address or Domain** field, enter the public IP address or domain of your PBX.

 **Note:** If your PBX uses HTTPS protocol, you need to enter the domain in the **Public IP Address or Domain** field.

2. In the drop-down list of **Protocol and external port**, select the forwarded external port.

 **Note:**

- We recommend that you use HTTPS 8040 for secure communication, and [upload HTTPS certificate](#) to PBX.
- Make sure that the web access port of your PBX is forwarded to the selected external port on public IP or domain . Otherwise, the authorization will fail.

Step 1: Enter the public IP address of your PBX

Please enter the public IP address or domain of your PBX and choose a forwarded external port to communicate with Zoho. Note: Zoho will interact with the PBX via specific port of your PBX's public IP or domain. Please make sure your PBX's HTTPS or HTTP port is forwarded to the selected external port on public IP or domain and make sure it is protected.

Public IP Address or Domain:

Protocol and external port:

3. Click **Next** to enable Phonebridge on Zoho.

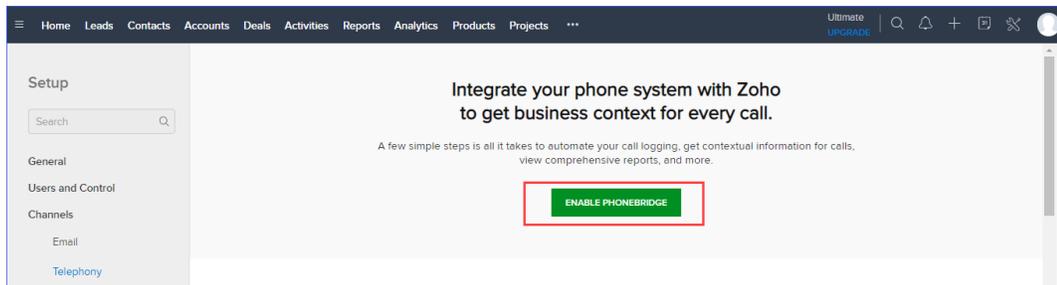
Step 2. Enable Phonebridge on Zoho

The procedures are different on Zoho One and Zoho applications:

- [Enable Phonebridge on Zoho One](#)
- [Enable Phonebridge on Zoho CRM, Zoho Mail, Zoho Recruit, or Zoho Desk](#)

Enable Phonebridge on Zoho One

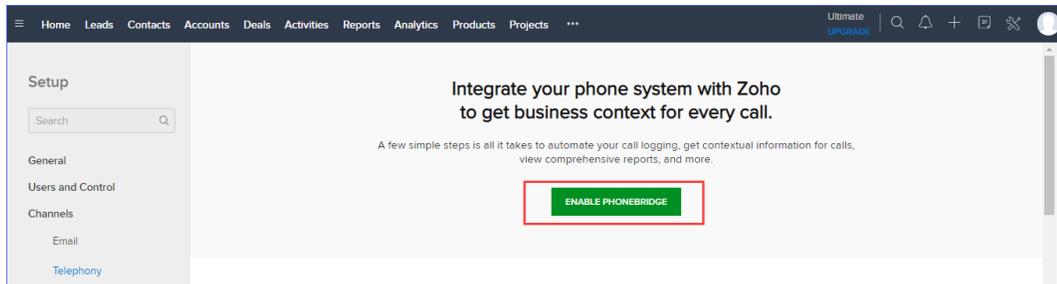
1. Log in the Zoho One with super administrator account.
2. Go to **Marketplace**→**Telephone**.
3. Click **Learn More** button.
4. Click **ENABLE PHONEBRIDGE**.



5. Back to PBX web interface, click **Next** in the **Zoho Integration** page, [get Zoho user consent](#).

Enable Phonebridge on Zoho CRM, Zoho Mail, Zoho Recruit, or Zoho Desk

1. Log in your Zoho application with super administrator account.
2. Go to **Setup**→**Channels**→**Telephone**.
3. Click **ENABLE PHONEBRIDGE** button.



4. Back to PBX web interface, click **Next** in the **Zoho Integration** page, [get Zoho user consent](#).

Step 3. Get Zoho User consent

 **Note:** Do NOT integrate your Zoho with multiple PBXs, or you cannot make calls and receive calls in Zoho.

1. In the **Zoho Login Address** drop-down list, select your Zoho application address.

Step 3: Get Zoho User Consent

Note: Do NOT integrate your Zoho with multiple PBXs, or you cannot make calls and receive calls in Zoho.

Please click "Authorize". By clicking on it, you will be redirected to Zoho with a new window. Please click "Accept" in the new window to authorize the PBX to access data in your Zoho account.

Zoho Login Address:

2. Click **Authorize**, the browser automatically opens the Zoho authentication page.



Yeastar

Yeastar would like to access the following information.

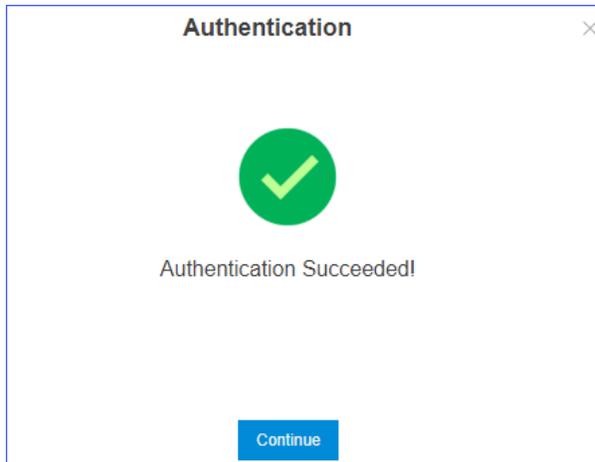
 **PhoneBridge**

- ✓ Allow to log your calls inside Zoho
- ✓ To view the information associated with the caller/callee

By clicking the "Accept" button you allow Yeastar to access data in your Zoho account.

3. In the Zoho authentication page, click **Accept**, and allow the PBX to access data in Zoho account.
4. Back to PBX **Zoho Integration** page.

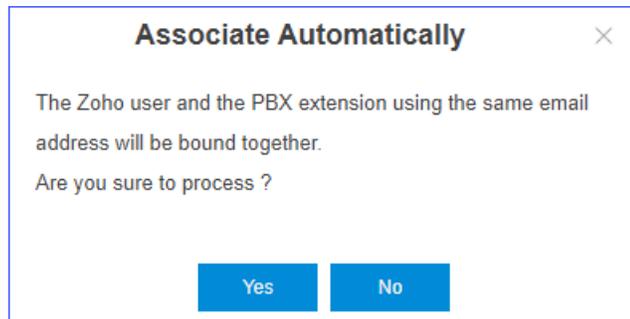
If authorization success, the following page will appear, click **Continue**, and [associate Zoho user with PBX extension](#).



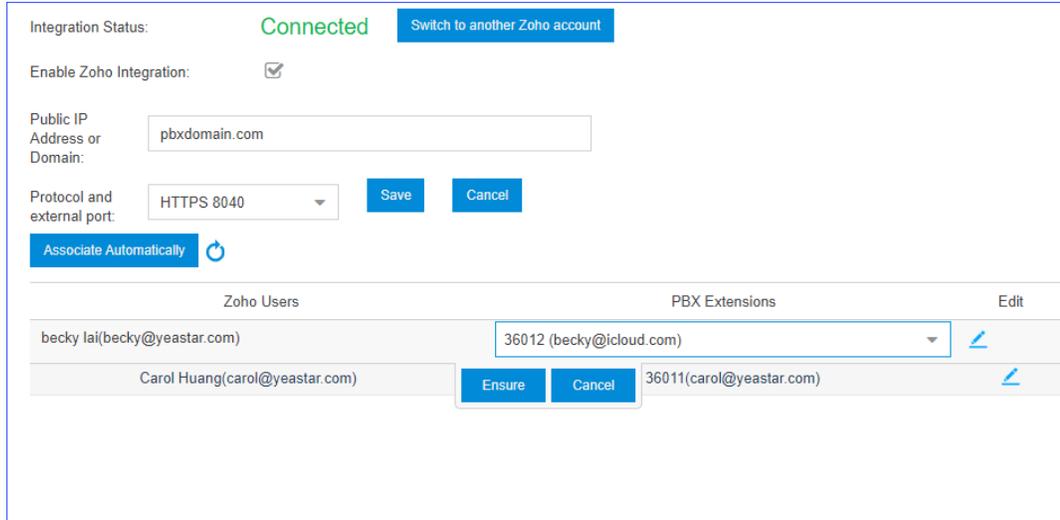
Step 4. Associate Zoho users with PBX extensions

To allow Zoho users make calls on Zoho applications, you need to associate their Zoho accounts and extensions.

1. In the **Zoho Integration** page, click  to refresh the user list.
2. Associate Zoho users with PBX extensions:
 - **Associate Automatically:** Zoho users and the extensions with the same email address will be associated directly.
 - a. Click **Associate Automatically**.
 - b. Click **Yes**.



- **Associate Manually:** If a user binds different email addresses to his/her Zoho account and PBX extension, you need to manually associate the user's Zoho User account and PBX extension.
 - a. Beside the Zoho user, click , select an extension.
 - b. Click **Ensure**.



Use Zoho Integration

After integrating Yeastar S-Series VoIP PBX and Zoho applications, the Zoho users can manage calls in Zoho applications.

Important: Make sure that Zoho users' extensions are registered on IP phones or softphones, otherwise, they cannot handle calls on Zoho applications.

Incoming call pop-ups

When the Zoho user receives an incoming call from Zoho contact via PBX, the user's phone rings, and a Contact Card pop-up in Zoho application.

The Zoho user can quick glance at the essential details and answer call on the phone.

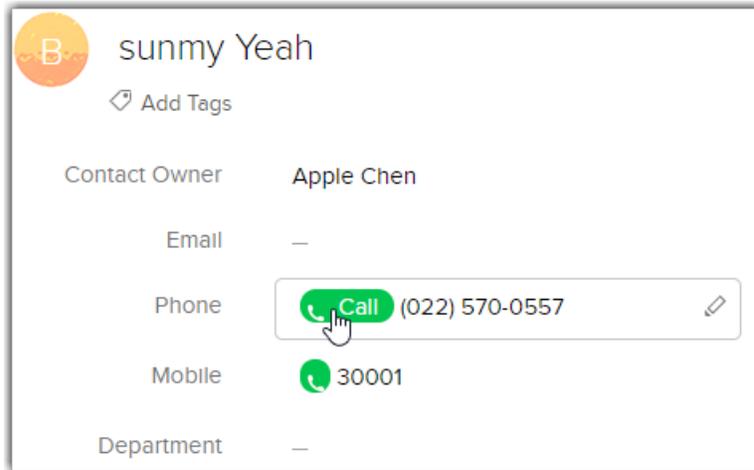


Click-to-Call

A Zoho user can initial a call to Zoho contact in Zoho application.

1. In the contact's detail page, click the green **Call** icon beside the phone number. 

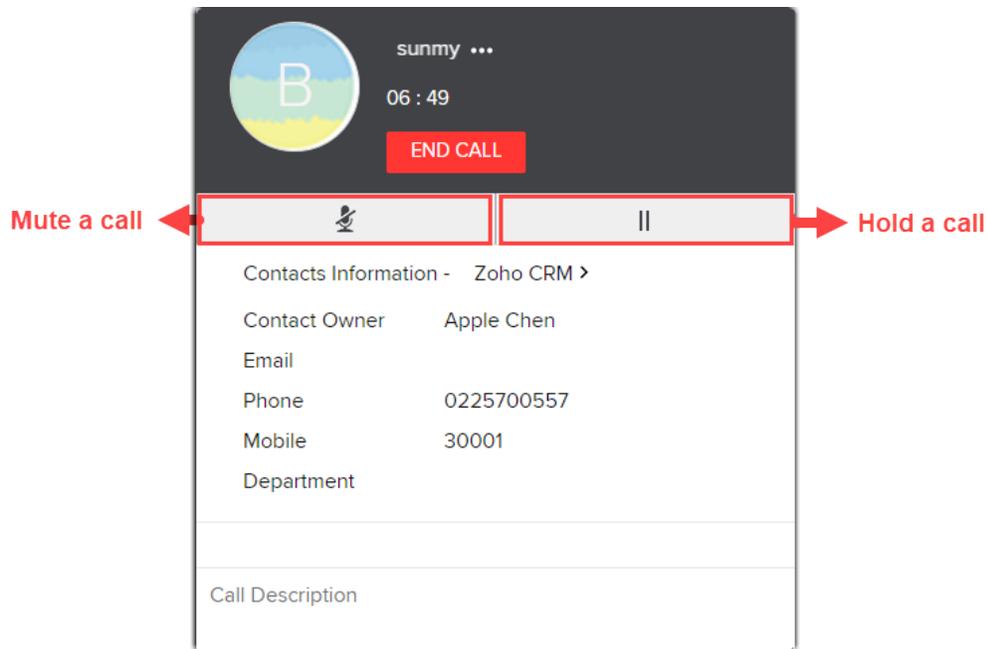
The Zoho user's phone will ring first.



2. The Zoho user answers the call, then the PBX starts to call the contact.

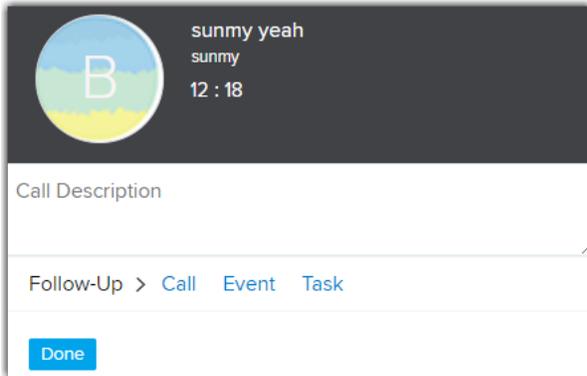
Call control

During a call, the Zoho user can end the call, hold the call, or mute the call.



Follow-up activity

After the end of call, Zoho user can do any of the following activities from the Call End window in Zoho application, for subsequent follow-up visits.



- Click **Call** to add a follow-up call.
Set up reminders for the calls so that you do not miss the opportunity to call the customer.

The 'Create Call' form contains the following fields and values:

- Contact Name:** Contact bibabo (with a search icon)
- Subject:** (empty field)
- Call Purpose:** None
- Related To:** Account (with a search icon)
- Call Type:** Outbound
- Schedule Call:**
 - Call Start Time: 11/21/2019 02:16AM
- Description:** (empty field)

At the bottom right, there are two buttons: a blue 'Done' button and a grey 'Cancel' button.

- Click **Task** to create a task.
Task refers to a specific piece of work required to be done within a given time frame. In Zoho CRM, you can create recurring tasks and set reminders to your tasks.

Create Task

Subject 

Due Date MM/DD/YYYY

Priority High

Owner Apple Chen ▾ 

Reminder

Repeat

More Fields >

- Click **Event** to create a event.

Event refers to an activity that happens at a given place and time. In Zoho CRM, you can create recurring events, set reminders, and add invitees to the event.

Event Information

New Event

Location

Make this an online meeting ?

All day

From 11/21/2019 11:00 AM

To 11/21/2019 12:00 PM

Host Apple Chen ▾

Related To Contact ▾

[Add more details](#)
Cancel
Done

View the call log

All outgoing calls, incoming calls, and missed call records on the PBX will be logged on the Zoho application. You can view the call log in **Activities** page.

<input type="checkbox"/>	SUBJECT	CALL TYPE	CALL START TIME	CALL DURATION	RELATED TO	CONTACT NAME	ACTIVITY OWNER
<input type="checkbox"/>	Incoming call from bibabo (30001)	Inbound	Nov 21, 2019 02:02 AM	12:18		bibabo	Apple Chen
<input type="checkbox"/>	Missed call from bibabo (30001)	Missed	Nov 21, 2019 02:02 AM	00:00		bibabo	Apple Chen
<input type="checkbox"/>	Outgoing call to Account (1000)	Outbound	Oct 10, 2019 05:59 AM	00:08		Account	Apple Chen
<input type="checkbox"/>	Outgoing call to Account (1000)	Outbound	Oct 10, 2019 05:56 AM	00:13		Account	Apple Chen

Disable Zoho Integration

You can disable Zoho integration at any time.



Note:

- After disabling the Zoho Integration, all the Zoho users can not handle calls in Zoho applications via PBX.
- Call logged before the integration was disabled remain intact.

1. Log in PBX web interface, go to **Zoho Integration**.
2. Unselect the check box of **Enable Zoho Integration**.

The **Integration Status** displays **Disabled**.

Integration Status: Disabled [Switch to another Zoho account](#)

Enable Zoho Integration:

Public IP Address or Domain:

Protocol and external port: [Save](#) [Cancel](#)

[Associate Automatically](#)

Zoho Users	PBX Extensions	Edit
becky lai(becky@yeastar.com)	Unassociated	↙
Carol Huang(carol@yeastar.com)	Unassociated	↙

Zoho Integration - FAQ

1. **The integration status shows "Error".**
 - a. Click **Refresh**, the status will be changed to **Connected**.
 - b. If the integration is still disconnected, do the followings:
 - Check if PBX can access to the Internet or not.
 - Check if the Yeastar Integration is enabled or not on the Zoho applications.
 - c. If the integration status is still abnormal, contact Yeastar support.
2. **There is no click-to-call phone icon beside the phone number in the Lead/Contact Details page.**
 - Check if the Zoho account is associated with the PBX extension.
If fail to associate, you can [associate them manually](#).
3. **There is no call pop-up in Zoho CRM when a call comes.**
 - Check if the Zoho account is associated with the PBX extension.
 - Check the Zoho Integration status on the PBX. If the status shows "Error", click **Refresh** to refresh the status.
4. **PBX doesn't display all the Zoho accounts on the Zoho CRM Integration page.**
 - Check if the Zoho accounts are activated on Zoho CRM.